



UNITED STATES ENVIRONMENTAL PROTECTION AGENCY
CINCINNATI PROCUREMENT OPERATIONS DIVISION
CINCINNATI, OHIO 45268

SUBJECT: Request for Task Order Proposal, Tracking Number PR-OW-18-00424

FROM: Angela Lower
Contracting Officer

TO: Multiple Award Contract Holders under TSAWP II

Attached is request for task order proposal for the subject tracking number which is issued for competition for the project entitled, "Clean Water Act Section 303(d) Program Support."

The government requests you prepare a proposal (cost and technical) for the task order. The proposals shall be submitted to lower.angela@epa.gov by Noon ET on September 6, 2018. The technical proposal is limited to ten (10) pages. Cost Proposals shall be provided in accordance with Contract Clause B-1 as supplemented by the attached cost proposal instructions. Proposals shall also include the required conflict of interest certification.

The following documents provided for this solicitation will become part of the Task Order Award:

- Performance Work Statement
- Task Order Clauses

Award of a Cost Plus Fixed Fee – Term Type Level of Effort task order will result. The period of performance for this Task Order is for a base period of approximately 10 months and four 1-year option periods with an anticipated start date of Oct 1, 2018 Please see attached technical evaluation criteria which will be used to evaluate the offer. Award will be made on a Best Value Tradeoff basis, where technical quality is equally important as cost.

Any questions should be directed to lower.angela@epa.gov within five days of issuance of this Solicitation.

 08/20/2018

Angela Lower
Contracting Officer

Cc:

Damon Highsmith, CL COR

Chris Laabs, Alternate CL COR

Rosaura Conde, TO COR

Carol Peterson, Alt. TO COR

Lisa Mitchell-Flinn, Contract Specialist

Attachments:

Performance Work Statement

Task Order Clauses

Cost Proposal Instructions

Technical Evaluation Criterion

PERFORMANCE WORK STATEMENT
TSAWP Contracts Task Order Solicitation PR-OW-18-00424
[Contract Number] [Task Order Number]

CLEAN WATER ACT SECTION 303(D) PROGRAM SUPPORT

A. BACKGROUND

The Section 303(d) program is responsible for implementing the portions of the Clean Water Act (CWA) dealing with identification of impaired waters and development of Total Maximum Daily Loads (TMDLs). The CWA requires states to identify waters that do not or are not expected to meet applicable water quality standards with current pollution control technologies alone. States then develop TMDLs at a level necessary to achieve the applicable state water quality standards. Waters targeted for TMDL development are based on the extent of pollution and the use(s) of the water, (e.g., health of aquatic life or public recreation), and the identity of the pollutant(s) causing or expected to cause the impairment. Additional information about the CWA Section 303(d) program can be found at: <https://www.epa.gov/tmdl>.

This Task Order (TO) will support the Environmental Protection Agency (EPA) by providing research and analysis on key issues pertaining to water quality assessment methodologies, impaired waters listing practices and TMDL development. Tasks in this TO have the purpose of informing policy development, program decisions, and program staff. Additionally, this TO aims to put the information gathered in context for program staff through the development of training slides or other instructional materials.

Research topics will be identified in an iterative way as needs for the program evolve during the period of performance (see Tasks 3 through 5). EPA anticipates that no more than eight (8) topics will be addressed each year, roughly two each quarter. Staff with strong writing and analytical skills, and with a historic understanding of the program are preferred.

B. Level of Effort

It is anticipated that the number of hours required for each period is as follows:

Base Year	1000
Option Year 1	1000
Option Year 2	1000
Option Year 3	1000
Option Year 4	1000

C. Tasks

After task order (TO) award and initiation of Task 1, the Task Order Contracting Officer Representative (TOCOR) shall furnish technical direction (TD) on a case-by-case basis. The Contractor shall anticipate working with the TOCOR and EPA/state technical staff; however, TOCOR, the EPA Alternate TOCOR (if the TOCOR is on leave or travel), the EPA Contract Level Contracting Officer Representative (CL-COR) and the EPA Contracting Officer (CO) are the only individuals authorized to issue technical direction. Other government personnel may engage in technical communications with the contractor, but are not authorized to give technical direction.

Task 1. Quality Assurance/Quality Control

Quality Assurance (QA) is an important component of EPA's work to assure that minimum quality standards are attained. The contractor shall follow the Quality Management Plan (QMP) that has been customized and incorporated into this Technical Support for Assessment and Watershed Protection (TSAWP) contract. In

addition, the contractor shall document the processes for Quality Assurance that it will follow for the tasks under this Task Order. EPA policy requires that an approved Quality Assurance Project Plan (QAPP) be in place before any work begins that involves the collection, generation, evaluation, analysis or use of environmental data.

The Performance Work Statement (PWS) includes activities that would constitute secondary data collection. These tasks will be followed to comply with the quality assurance/quality control requirement:

- 1.1 Within seven (7) business days after the kick-off meeting (Task 2.1), the contractor shall prepare and submit for EPA review a draft Quality Assurance Project Plan (QAPP) documenting how quality assurance (QA) and quality control (QC) will be applied to the generation, collection, evaluation, analysis and use of environmental data. EPA will review the contractor's draft QAPP and provide the Contractor with written approval or written comments. The contractor shall write the QAPP using the active voice. The QAPP shall provide enough detail to clearly describe objectives of the project supported by the task order; the type of data to be collected, generated, or used under this task order to support the project objectives; the quality objectives needed to ensure that these will support the project objectives; and the quality assurance and quality control activities to be performed to ensure that any results obtained are documented and are of the type, quality, transparency, and reproducibility needed. The QAPP must be consistent with the guidance document, EPA Requirements for Quality Assurance Project Plans: EPA QA/R-5 (www.epa.gov/quality/qs-docs/r5-final.pdf).
- 1.2 The Contractor shall submit a revised QAPP within six (6) business days of receipt of the written comments on the draft QAPP, unless otherwise instructed by the EPA Task Order Contracting Officer's Representative (TOCOR). Under no circumstances shall work that involves the generation, collection, evaluation, analysis, or use of environmental data be performed until the contractor receives written notification from the EPA TOCOR that EPA has approved the contractor's QAPP. Any non-sampling/non-analytical work that involves the generation, collection, evaluation, analysis, or use of environmental data that is initiated prior to EPA approval of the contractor's QAPP must be performed in accordance with the approved QAPP. EPA may request the contractor to furnish written documentation from the Contractor showing that the contractor has complied with this requirement. All QA documentation, including the QAPP, prepared under this Task Order, shall be considered non-proprietary, and shall be made available to the public upon request.

Additional QA Documentation Required

- 1.3 In addition to the QAPP requirements described above, for all major deliverables produced by the contractor under this Task Order, a discussion of the QA/QC activities that were or will be performed to support the deliverable must accompany the deliverable. For newsletters, fact sheets, and annual reports that rely exclusively on secondary data, these can be in separate documents, rather than embedded in the deliverables themselves. This shall be at the TOCOR's discretion, not the Contractor's. The contractor shall immediately notify the TOCOR of any QA problems encountered that may impact the performance of this Task Order, with recommendations for corrective action. (See Task 2.4.)
- 1.4 The contractor also shall provide EPA with monthly status reports of QA-related activities performed during implementation of this Task Order. These monthly QA reports shall identify QA activities performed to support implementation of this Task Order, problems encountered, deviations from the QAPP, and corrective actions taken. If desired, the contractor may include this as a part of the contract-required monthly financial/technical progress report. All written materials must be compliance with Section 508 of the Americans with Disabilities Act.
- 1.5 If, during the Period of Performance of this Task Order, the EPA TOCOR provides technical direction that revisions to the QAPP are determined to be necessary, the contractor shall submit a revised QAPP,

including the revision summary, within seven (7) business days after receiving written technical direction to do so. When preparing this draft revised QAPP, the contractor shall ensure that it is written in an active voice, changes are presented in a track changes version of MS Word, and shall include a version history page that summarizes changes made. The contractor also shall provide EPA with copies of any modified SOPs or checklists. EPA will review the draft revised QAPP and provide the contractor with written approval or comments. The contractor shall provide a final QAPP that responds to EPA's written comments within six (6) business days of receipt of EPA's comments on the draft revised QAPP.

Task 1 Deliverables:

- Draft QAPP
- Revised QAPP

Task 2 – Communications

- 2.1 Prior to beginning work on this Task Order, the TOCOR shall schedule a kick-off meeting with the contractor to discuss the tasks within this Task Order, the goals of the Task Order, and to review the schedule of milestones and expectations. The contractor shall participate in a kickoff meeting with the TOCOR either in person or via conference call to discuss the following: points of contact, roles and responsibilities, Quality Assurance protocols, timelines, the schedule of benchmarks, milestones and deliverables, establish dates and time for monthly calls, and monthly technical progress reports and general Task Order administrative information. The contractor shall not incur any additional billable costs other than those related to Task 1 and Task 2.1 until receipt from TOCOR of written notification that EPA's Quality Assurance Officer has accepted the QAPP.
- 2.2 The TOCOR shall coordinate and set up regular status discussions (at least monthly) between EPA staff and the contractor's technical lead to discuss the status and progress of the work under this Task Order. The contractor shall participate in these discussions, which may either be in person or via phone, if face-to-face communication is not convenient to either party. The frequency of these discussions may be modified based on project status at the request of the contractor and only as approved by the TOCOR. TOCOR shall provide the contractor with one-week notice of any scheduled status calls. All status discussions will take place during normal business hours: 9:00AM to 5:30PM Eastern Time. The contractor shall provide meeting summaries after the monthly discussions within five (5) business days in draft form for the TOCOR to review. The TOCOR will provide any edits and/or comments on the meeting minutes to the contractor within five (5) business days of receipt of draft summaries. Then, final written meeting summaries shall be provided within five (5) business days after receipt of comments from the TOCOR. If no edits or comments are provided by the TOCOR, the draft written summary will constitute as the final summary.
- 2.3 The contractor shall provide monthly progress reports on the status of all tasks in this Task Order. These progress reports shall meet the requirements of PWS Section D: Reporting, as well as the QA documentation requirements specified in Task 1.4.
- 2.4 The contractor shall notify the TOCOR of any problems, delays or questions as soon as they arise, including immediate notification of any quality assurance issues. Problems, delays, or significant questions should be brought to the attention of the TOCOR in real time, but in any case, not later than three (3) business days. This notification may be sent by phone or email, but if transmitted by phone, the contractor shall send a follow-up email to the TOCOR within three (3) business days, describing the problem.

Task 2 Deliverables:

- Kick-off meeting
- Status calls
- Status call summary

- Monthly progress reports
- Progress report pre-midyear
- Progress report pre-end of year

Task 3 – Research and Reports – Impaired Waters Listing

Often in the process of providing policy direction for the program, EPA identifies a need for additional information in the form of summaries of standard practices used across the states and territories. For instance, in considering recommendations for assessing waters using a recreational criterion, EPA would need to better understand how the states are using beach advisory data and information in determining impairment status. The purpose of this task is to inform a topic area within impaired waters listing and/or research questions regarding the approaches used to conduct assessments. EPA anticipates no more than three research topics or questions will be worked on by contractor each year. The schedule in Section C reflects the assumption that we would be working on no more than one topic per quarter for both Task 3 and 4. The contractor shall provide a summary of their findings for each one in the form of a research paper or fact sheet with references to relevant sections in documents where supporting information can be found. The task will be further defined through technical direction from the EPA TOCOR using the process described below. Contract staff with strong analytical and writing skills, as well as an understanding of the impaired waters listing process would be best able to fulfil the needs of this task.

- 3.1 Scoping Meeting. Each contract year, EPA will develop a list of potential research topics, each with a description, deliverable type (e.g., fact sheet, research paper), and level of priority (i.e., high, medium, low). EPA TOCOR and the contractor will discuss potential approaches to tackle these questions, product needs, and timing for deliverables. At this meeting the contractor shall be expected to request additional information needed to develop a scoping document from the EPA TOCOR. The topics identified at this meeting will largely guide projects for that contract year, but may be revisited upon request from EPA. Revisions to the list of topics will be done following the process outlined in task 3.1 through 3.4.
- 3.2 Scoping Document. For each topic identified at the scoping meeting the contractor shall provide a proposed plan and schedule. The schedule should include periodic check-in meetings (e.g., once a month) and allow sufficient time for comments from the EPA TOCOR prior to delivery of the final product.
- 3.3 Compilation of Relevant Documents. The contractor shall compile relevant documentation regarding state assessment methodologies for identifying impaired waters. These can typically be found in the form of an Integrated Report, listing methodology document, or state rule. The documents should be stored in a platform that can be accessed by both the contractor and EPA TOCOR (e.g., cloud based file sharing system or FTP site) and updated, as needed, each year.
- 3.4 Summary Findings. The contractor shall develop separate deliverables for each research topic identified. The type of the deliverable will be discussed at the scoping meeting and included in the Scoping Document. Most of these deliverables will likely take the form of a research paper or fact sheet with references to supporting information. We anticipate no more than five (5) Summary Finding documents will be developed by contractor each year.

Task 3 Deliverables:

- Scoping meeting
- Scoping document
- Repository of relevant documents (per project or combined, as appropriate)
- Draft Summary Findings document (per project)
- Final Summary Findings document (per project)

Task 4 – Research and Reports – Total Maximum Daily Loads (TMDLs)

EPA has approved and established close to 75,000 TMDLs since 1996. As the program evolves, EPA often considers existing policy and guidance in light of current TMDLs development practices. For instance, in evaluating recommendations for a cadmium water quality criterion, EPA would need to consider approaches currently used in TMDLs for the hardness dependent metals criteria. The purpose of this task is to help address these questions and inform the policy process. This Task may also be used to conduct a peer-review of a specific TMDL. EPA anticipates no more than six (6) research topics and/or peer reviews will be worked on by contractor each year. The schedule in Section C reflects the assumption that we would be working on no more than one topic per quarter for both Task 3 and 4. The contractor shall provide a summary of their findings for each one in the form of a research paper, report or fact sheet with references to relevant sections in documents where supporting information can be found. The task will be further defined through technical direction from the EPA TOCOR using the process described below. Contract staff with strong analytical and writing skills, as well as an understanding of TMDLs process would be best able to fulfil the needs of this task.

- 4.1 Scoping Meeting. Each contract year, EPA will develop a list of potential research topics, each with a description, deliverable type (e.g., fact sheet, research paper), and level of priority (i.e., high, medium, low). EPA TOCOR and the contractor will discuss potential approaches to tackle these questions, product needs, and timing for deliverables. At this meeting the contractor will be expected to request additional information needed to develop a scoping document from the EPA TOCOR. The topics identified at this meeting will largely guide projects for that contract year, but may be revisited upon request from EPA. Revisions to the list of topics will be done following the process outlined in task 4.1 through 3.4.
- 4.2 Scoping Document. For each topic identified at the scoping meeting the contractor shall provide a proposed plan and schedule. The schedule should include periodic check-in meetings (e.g., once a month) and allow sufficient time for comments from the EPA TOCOR prior to delivery of the final product. The contractor will also include a discussion of specific information needed from the impaired waters listing and TMDL database (ATTAINS), preferably in the form of a query with specific fields (e.g., TMDL ID, waterbody name) to include in the data download. If the research question being asked necessitates looking at a subset of TMDLs, the scoping document should propose an approach and criteria for identifying individual TMDL documents to look at.
- 4.3 Compilation of Relevant Documents. EPA will provide the contractor with a current download from ATTAINS according to the specifications defined in the Scoping Document or specific TMDL documents, if pursuing peer-review. The contractor shall compile relevant TMDL documents needed to answer each question. The documents should be stored in a platform that can be accessed by both the contractor and EPA TOCOR (e.g., cloud based file sharing system or FTP site)¹.
- 4.4 Summary Findings. The contractor shall develop separate deliverables for each research topic identified. The form of the deliverable will be discussed at the scoping meeting and included in the Scoping Document. Most of these deliverables will likely take the form of a research paper or fact sheet with references to supporting information. We anticipate that no more than three Summary Finding documents will be developed by the contractor each year.

Task 4 Deliverables (per project):

- Scoping meeting
- Scoping document
- Repository of relevant documents (per project)
- Draft Summary Findings document (per project)

¹ The repository is for internal use. EPA TOCOR has access to Microsoft OneDrive and Sharepoint technology.

- Final Summary Findings document (per project)

Task 5 – In-Depth Analysis or Training Materials

Once a research product is finalized, EPA may decide that additional analysis or a different format is needed to further inform the issue. In-depth analysis could include a comparison of different approaches or a series of case studies illustrating a specific approach. Another option under this task is to develop training materials based on the information collected. This task is designed to build off one of the topics researched in Tasks 3 and 4. EPA anticipates that this level of detail will be reserved for no more than three (3) topics each year. This task will be further defined through technical direction from the EPA TOCOR using the process described below. Contract staff with strong analytical and writing skills, as well as an understanding of the impaired waters listing process would be best able to fulfil the needs of this task.

- 5.1 Scoping Meeting. Since this task is meant to build on work done under Tasks 3 and 4, the scoping meeting will happen after a final deliverable under these tasks in consultation with the EPA TOCOR. The EPA TOCOR and the contractor will discuss potential approaches to tackle these questions, product needs, and timing for deliverables. At this meeting the contractor will request any additional information needed to develop a scoping document.
- 5.2 Scoping Document. For the topic identified at the scoping meeting the contractor shall provide a proposed plan and schedule. The schedule should include periodic check-in meetings (e.g., once a month) and allow sufficient time for comments from the EPA TOCOR prior to delivery of the final product. The contractor will also include any specific needs for documentation or data pulls from EPA.
- 5.3 Compilation of Relevant Documents. The contractor shall compile any additional documents needed for this task and store them in a platform that can be accessed by both the contractor and EPA TOCOR (e.g., cloud based file sharing system or FTP site).
- 5.4 Analysis document. The form of the deliverable will be discussed at the scoping meeting and included in the Scoping Document. In-depth analysis would include a comparison of different approaches or a series of case studies illustrating a specific approach. We anticipate that no more than two in-depth analysis documents will be developed by the contractor each year.

Task 5 Deliverables:

- Scoping meeting
- Scoping document
- Updated repository of documents (updated from Task 3 or 4)
- Draft Summary Findings document (per project)
- Final Summary Findings document (per project)

C. SCHEDULE OF BENCHMARKS, DELIVERABLES & MILESTONES:

Base Period: 12 months		
TASK	BENCHMARK / DELIVERABLE / MILESTONES	SCHEDULE
1-1	Draft QAPP	Within 7 business days from Kick-off meeting (Task 2.1)
1-2	Final QAPP	Within 6 business days from written comments on draft.
2-1	Kick-off meeting	Within 10 days of TO Award
2-1	Summary of Kick-off meeting	Within 5 days after meeting
2-2	Monthly status calls	Agree on with contractor at Kick-off meeting
2-2	Monthly status call summary	Within 5 days after call
2-3	Monthly progress reports	As specified in contract
2-3	Progress report pre-midyear	NLT 60 days prior to midpoint of base year
2-3	Progress report pre-end of year	NLT 60 days prior to end of base year
3-1	Scoping meeting	Within 30 days of TO Award
3-2	Scoping document	Within 10 days from Scoping Meeting
4-1	Scoping meeting	Within 30 days of TO Award
4-2	Scoping document	Within 10 days from Scoping Meeting
5-1	Scoping meeting	Within 10 days of EPA TOCOR Request
5-2	Scoping document	Within 10 days from Scoping Meeting
RESEARCH PROJECT DETAILED DELIVERABLES AND MILESTONES		
3-3	Repository of Relevant Documents	Within 30 days of accepted EPA TOCOR Scoping Document (Task 3-2)
3-4	Draft Summary Findings Document	Within 60 days of beginning of each project (defined timeline in Scoping Document – Task 3-2)
3-5	Final Summary Findings Document	Within 120 days of beginning of each project (defined timeline in Scoping Document – Task 3-2)
4-3	Repository of Relevant Documents	Within 30 days of accepted EPA TOCOR Scoping Document (Task 4-2)
4-4	Draft Summary Findings Document	Within 60 days of beginning of each project (defined timeline in Scoping Document – Task 4-2)
4-5	Final Summary Findings Document	Within 120 days of beginning of each project (defined timeline in Scoping Document – Task 4-2)
5-3	Updated Repository of Relevant Documents	Within 15 days of accepted EPA TOCOR Scoping Document (Task 5-2)
5-4	Draft Summary Findings Document	Within 90 days of beginning of each project (defined timeline in Scoping Document – Task 5-2)
5-5	Final Summary Findings Document	Within 180 days of beginning of each project (defined timeline in Scoping Document – Task 5-2)
Option Period 1: 12 months		
TASK	BENCHMARK / DELIVERABLE / MILESTONES	SCHEDULE
1-2	Written summary of QAPP update check	Within 30 days of beginning of new Option Period
1-2	QAPP update, if requested through Technical Direction.	10-15 business days after receipt of written technical direction

2-2	Status calls	Agree on with contractor at Kick-off meeting
2-2	Status call summary	Within 5 days after call
2-3	Monthly progress reports	As specified in contract
2-3	Progress report pre-midyear	NLT 60 days prior to midpoint of new Option Period
2-3	Progress report pre-end of year	NLT 60 days prior to end of Option Period
3-1	Scoping meeting	Within 30 days of new Option Period
3-2	Scoping document	Within 10 days from Scoping Meeting
4-1	Scoping meeting	Within 30 days of new Option Period
4-2	Scoping document	Within 10 days from Scoping Meeting
5-1	Scoping meeting	Within 10 days of EPA TOCOR Request
5-2	Scoping document	Within 10 days from Scoping Meeting
RESEARCH PROJECT DETAILED DELIVERABLES AND MILESTONES		
3-3	Repository of Relevant Documents	Within 30 days of accepted EPA TOCOR Scoping Document (Task 3-2)
3-4	Draft Summary Findings Document	Within 60 days of beginning of each project (defined timeline in Scoping Document – Task 3-2)
3-5	Final Summary Findings Document	Within 120 days of beginning of each project (defined timeline in Scoping Document – Task 3-2)
4-3	Repository of Relevant Documents	Within 30 days of accepted EPA TOCOR Scoping Document (Task 4-2)
4-4	Draft Summary Findings Document	Within 60 days of beginning of each project (defined timeline in Scoping Document – Task 4-2)
4-5	Final Summary Findings Document	Within 120 days of beginning of each project (defined timeline in Scoping Document – Task 4-2)
5-3	Updated Repository of Relevant Documents	Within 15 days of accepted EPA TOCOR Scoping Document (Task 5-2)
5-4	Draft Summary Findings Document	Within 90 days of beginning of each project (defined timeline in Scoping Document – Task 5-2)
5-5	Final Summary Findings Document	Within 180 days of beginning of each project (defined timeline in Scoping Document – Task 5-2)
Option Period 2: 12 months		
TASK	BENCHMARK / DELIVERABLE / MILESTONES	SCHEDULE
1-2	Written summary of QAPP update check	Within 30 days of beginning of new Option Period
1-2	QAPP update, if requested through Technical Direction.	10-15 business days after receipt of written technical direction
2-2	Status calls	Agree on with contractor at Kick-off meeting
2-2	Status call summary	Within 5 days after call
2-3	Monthly progress reports	As specified in contract
2-3	Progress report pre-midyear	NLT 60 days prior to midpoint of new Option Period
2-3	Progress report pre-end of year	NLT 60 days prior to end of Option Period
3-1	Scoping meeting	Within 30 days of new Option Period

3-2	Scoping document	Within 10 days from Scoping Meeting
4-1	Scoping meeting	Within 30 days of new Option Period
4-2	Scoping document	Within 10 days from Scoping Meeting
5-1	Scoping meeting	Within 10 days of EPA TOCOR Request
5-2	Scoping document	Within 10 days from Scoping Meeting
RESEARCH PROJECT DETAILED DELIVERABLES AND MILESTONES		
3-3	Repository of Relevant Documents	Within 30 days of accepted EPA TOCOR Scoping Document (Task 3-2)
3-4	Draft Summary Findings Document	Within 60 days of beginning of each project (defined timeline in Scoping Document – Task 3-2)
3-5	Final Summary Findings Document	Within 120 days of beginning of each project (defined timeline in Scoping Document – Task 3-2)
4-3	Repository of Relevant Documents	Within 30 days of accepted EPA TOCOR Scoping Document (Task 4-2)
4-4	Draft Summary Findings Document	Within 60 days of beginning of each project (defined timeline in Scoping Document – Task 4-2)
4-5	Final Summary Findings Document	Within 120 days of beginning of each project (defined timeline in Scoping Document – Task 4-2)
5-3	Updated Repository of Relevant Documents	Within 15 days of accepted EPA TOCOR Scoping Document (Task 5-2)
5-4	Draft Summary Findings Document	Within 90 days of beginning of each project (defined timeline in Scoping Document – Task 5-2)
5-5	Final Summary Findings Document	Within 180 days of beginning of each project (defined timeline in Scoping Document – Task 5-2)
Option Period 3: 12 months		
TASK	BENCHMARK / DELIVERABLE / MILESTONES	SCHEDULE
1-2	Written summary of QAPP update check	Within 30 days of beginning of new Option Period
1-2	QAPP update, if requested through Technical Direction.	10-15 business days after receipt of written technical direction
2-2	Status calls	Agree on with contractor at Kick-off meeting
2-2	Status call summary	Within 5 days after call
2-3	Monthly progress reports	As specified in contract
2-3	Progress report pre-midyear	NLT 60 days prior to midpoint of new Option Period
2-3	Progress report pre-end of year	NLT 60 days prior to end of Option Period
3-1	Scoping meeting	Within 30 days of new Option Period
3-2	Scoping document	Within 10 days from Scoping Meeting
4-1	Scoping meeting	Within 30 days of new Option Period
4-2	Scoping document	Within 10 days from Scoping Meeting
5-1	Scoping meeting	Within 10 days of EPA TOCOR Request
5-2	Scoping document	Within 10 days from Scoping Meeting
RESEARCH PROJECT DETAILED DELIVERABLES AND MILESTONES		
3-3	Repository of Relevant Documents	Within 30 days of accepted EPA TOCOR Scoping Document (Task 3-2)

3-4	Draft Summary Findings Document	Within 60 days of beginning of each project (defined timeline in Scoping Document – Task 3-2)
3-5	Final Summary Findings Document	Within 120 days of beginning of each project (defined timeline in Scoping Document – Task 3-2)
4-3	Repository of Relevant Documents	Within 30 days of accepted EPA TOCOR Scoping Document (Task 4-2)
4-4	Draft Summary Findings Document	Within 60 days of beginning of each project (defined timeline in Scoping Document – Task 4-2)
4-5	Final Summary Findings Document	Within 120 days of beginning of each project (defined timeline in Scoping Document – Task 4-2)
5-3	Updated Repository of Relevant Documents	Within 15 days of accepted EPA TOCOR Scoping Document (Task 5-2)
5-4	Draft Summary Findings Document	Within 90 days of beginning of each project (defined timeline in Scoping Document – Task 5-2)
5-5	Final Summary Findings Document	Within 180 days of beginning of each project (defined timeline in Scoping Document – Task 5-2)
Option Period 4: 11 months		
TASK	BENCHMARK / DELIVERABLE / MILESTONES	SCHEDULE
1-2	Written summary of QAPP update check	Within 30 days of beginning of new Option Period
1-2	QAPP update, if requested through Technical Direction.	10-15 business days after receipt of written technical direction
2-2	Status calls	Agree on with contractor at Kick-off meeting
2-2	Status call summary	Within 5 days after call
2-3	Monthly progress reports	As specified in contract
2-3	Progress report pre-midyear	NLT 60 days prior to midpoint of new Option Period
2-3	Progress report pre-end of year	NLT 60 days prior to end of Option Period
3-1	Scoping meeting	Within 30 days of new Option Period
3-2	Scoping document	Within 10 days from Scoping Meeting
4-1	Scoping meeting	Within 30 days of new Option Period
4-2	Scoping document	Within 10 days from Scoping Meeting
5-1	Scoping meeting	Within 10 days of EPA TOCOR Request
5-2	Scoping document	Within 10 days from Scoping Meeting
RESEARCH PROJECT DETAILED DELIVERABLES AND MILESTONES		
3-3	Repository of Relevant Documents	Within 30 days of accepted EPA TOCOR Scoping Document (Task 3-2)
3-4	Draft Summary Findings Document	Within 60 days of beginning of each project (defined timeline in Scoping Document – Task 3-2)
3-5	Final Summary Findings Document	Within 120 days of beginning of each project (defined timeline in Scoping Document – Task 3-2)
4-3	Repository of Relevant Documents	Within 30 days of accepted EPA TOCOR Scoping Document (Task 4-2)
4-4	Draft Summary Findings Document	Within 60 days of beginning of each project (defined timeline in Scoping Document – Task 4-2)

4-5	Final Summary Findings Document	Within 120 days of beginning of each project (defined timeline in Scoping Document – Task 4-2)
5-3	Updated Repository of Relevant Documents	Within 15 days of accepted EPA TOCOR Scoping Document (Task 5-2)
5-4	Draft Summary Findings Document	Within 90 days of beginning of each project (defined timeline in Scoping Document – Task 5-2)
5-5	Final Summary Findings Document	Within 180 days of beginning of each project (defined timeline in Scoping Document – Task 5-2)
END OF TABLE		

When the Task Order reaches 30 calendar days prior to the end of the Period of Performance in a given period, the contractor shall make a determination that the deliverables, milestones, benchmarks, and any outstanding technical direction from the TOCOR, will be satisfactorily completed in the form requested in the PWS by the end of the Period of Performance and for the remaining funding that is available.

If the contractor determines one or more of the above-referenced items will not be able to be completed in the requested form within the period of performance and with the available funding, the contractor shall notify the TOCOR and the CO immediately. Within 5 business days of said notification, the TOCOR in coordination with the CO will provide technical direction concerning use of the remaining funding to prepare and furnish to the TOCOR all interim draft deliverables, interim work products, and any working files in an electronic format which is supported by EPA, for eventual continuation of the project after the end date of the Task Order.

D. REPORTING

All documentation and reporting under this Task Order shall be in compliance with contract requirements.

E. DELIVERABLES AND GENERAL PERFORMANCE:

The contractor shall participate in meetings and conference calls arranged by the EPA Task Order Project Officer. The contractor shall, when requested by the TOCOR, provide supporting documentation when EPA is reviewing draft deliverables to facilitate EPA review and approval of the Contractor's work. Documentation shall include the electronic files and detailed, written explanation of all steps and decisions. The Contractor shall comply with this request when it is received from the TOCOR regardless of whether such a request is described in the individual tasks of this PWS. The Contractor shall furnish this information in such manner that no proprietary software will be needed for EPA to read, interpret, replicate or model any work product of this agreement, unless otherwise noted in this PWS or by written permission of the EPA TOCOR. The objective is that anyone with the appropriate skill level can use the information produced under this Task Order to check or duplicate the Contractor's work for replication and/or verification. With this understanding of how this Task Order's data will be used, any elements essential to successfully replicating analysis shall be provided to EPA in a commonly-used format.

The Contractor shall provide both scientific/technical and editorial review as defined in section 2.6 of the Prime Contract Performance Work Statement on any Task Order **draft** product before submission to the EPA TOCOR for review. This process does not need to be performed by an independent peer reviewer. All editorial review comments shall be addressed before deliverables are furnished to the EPA TOCOR for review (in the case of draft deliverables) or acceptance (in the case of final deliverables); and any questions raised by scientific/

technical review shall be either addressed or discussed with the EPA TOCOR prior to the contractor furnishing draft deliverables.

Upon receipt of written technical direction from the TOCOR, the contractor shall furnish:

- **all deliverables (draft and final) to EPA shall be furnished in an electronic version** and in an electronic format that EPA can support (see TSAWP Contract PWS section on Deliverables).
- **all final deliverables to EPA shall include one (1) electronic copy and a transmittal email that describes the attached deliverable and summarizes QA procedures applied in its development.** All final deliverables shall be prepared according to EPA publication guidelines and shall be compliant with Section 508 of the **Americans with Disabilities Act**. All electronic and information technology (eit) and all EIT deliverables be Section 508 compliant in accordance with the policies referenced at <http://www.epa.gov/accessibility/>. The contractor shall include documentation which indicates that the contractor has tested the deliverable against applicable Section 508 Standards.

All submittals to EPA shall be formatted as described below.

Electronic submissions shall be made in the following manner: electronic Microsoft Word© for any written reports, summaries or analysis documents, Microsoft Excel© format for any and all spreadsheets, ESRI file Geodatabase (or other format approved by the EPA TOCOR) for geospatial datasets. **Final electronic submissions** shall be on Compact Disk (CD) or Digital Versatile Disc (DVD) if too large to email as attachments or deliver via FTP. Every electronic document and all of the sections, text, graphs, charts or figures shall be unlocked, open and editable so that EPA may make further changes.

Appropriate electronic format that is supported by EPA and printing of all GIS data layers, maps, photos, bench sheets and other written material not easily printed or saved in the above formats shall be discussed and a format agreed upon with the EPA TOCOR prior to submittal by the contractor.

F. ANTICIPATED TRAVEL

All travel under this Task Order shall be in compliance with contract requirements and only according to specific Technical Direction. (See contract clause H-17). Travel is presently anticipated to be necessary for two onsite events involving two contractors, in each state RPS project, unless otherwise directed by the TOCOR.

G. CONTRACTOR IDENTIFICATION

Contractor personnel shall always identify themselves as Contractor employees by name and organization and physically display that information through an identification badge. Contractor personnel are prohibited from acting as the Agency's official representative.

The Contractor shall refer any questions relating to the interpretation of EPA policy, guidance, or regulation to the EPA Task Order Project Officer.

H. CONFERENCE/MEETING GUIDELINES AND LIMITATIONS:

The EPA projects that none of the individual meetings identified in these tasks will exceed a total cost of \$25,000. No conferences shall occur under this Task Order. The contractor shall immediately notify the EPA

Contracting Officer, PO and TOCOR of any anticipated individual event involving support for a meeting that may potentially incur \$23,000 or more in cost during performance. After notifying EPA of the potential to reach this threshold, the Contractor shall not proceed with the task(s) until authorized to do so by the Contracting Officer.

I. QUALITY ASSURANCE SURVEILLANCE PLAN: per contract requirements

1552.217-71 OPTION TO EXTEND THE TERM OF THE CONTRACT-COST-TYPE CONTRACT (APR 1984)

The Government has the option to extend the term of this contract for four (4) additional period(s). If more than 30 days remain in the contract period of performance, the Government, without prior written notification, may exercise this option by issuing a contract modification. To exercise this option within the last 30 days of the period of performance, the Government must provide to the Contractor written notification prior to that last 30-days of the period. This preliminary notification does not commit the Government to exercising the option. Use of an option will result in the following contract modifications:

(a) The "Period of Performance" clause will be amended to cover a base period and option periods:

	Period Start Date	End Date
/Base Period	Award	–08/02/2019
Option Period 1	08/03/2019	– 08/02/2020
Option Period 2	08/03/2020	– 08/02/2021
Option Period 3	08/03/2021	– 08/02/2022
Option Period 4	08/03/2022	– 08/02/2023

(b) Paragraph (a) of the "Level of Effort" clause will be amended to reflect a new and separate level of effort of:

Period	Level of Effort
Base Period	1000
Option Period 1	1000
Option Period 2	1000
Option Period 3	1000
Option Period 4	1000

(c) The "Estimated Cost and Fixed Fee" clause will be amended to reflect increased estimated costs and fixed fee for each option period as follows:

Period	Estimated Cost	Fixed Fee	Total CPFF
Option Period 1	TBD	TBD	TBD
Option Period 2	TBD	TBD	TBD
Option Period 3	TBD	TBD	TBD
Option Period 4	TBD	TBD	TBD

(d) If the contract contains "not to exceed amounts" for elements of other direct costs (ODC), those amounts will be increased as follows: N/A

LOCAL CLAUSES EPA-B-32-101 LIMITATION OF FUNDS NOTICE

(a) Pursuant to the Limitation of Funds clause, incremental funding in the amount of **\$TBD** is allotted to cover estimated cost. Funding in the amount of **\$TBD** is provided to cover the corresponding increment of base fee. The amount allotted for costs is estimated to cover the contractor's performance through **TBD**

(b) When the contract is fully funded (i.e. the sum of the total estimated cost, base fee, award fee pool available for award, and award fee awarded, as set forth in the schedule of this contract), the Limitation of Cost clause shall become applicable.

(c) Recapitulation of Funds

LOCAL CLAUSES EPA-B-16-102 ESTIMATED COST AND FIXED FEE

- (a) The estimated cost of this contract is **TBD**
- (b) The fixed fee **TBD**
- (c) The total estimated cost and fixed fee is **TBD**

LOCAL CLAUSE EPA-G-42-101 CONTRACT ADMINISTRATION REPRESENTATIVES

Task Order Contracting Officers Representatives (CORs)/Project Officers for this contract are as follows:

Task Order COR (TOCOR): Rosaura Conde, conde.rosaura@epa.gov PH (202)-566-1514

Alternate Task Order COR (Alt TOCOR): Carol Peterson, peterston.carol@epa.gov PH 202-566-1304

Contracting Officials responsible for administering this contract are as follows:

Contracting Officer

Angela Lower, US EPA. Cincinnati Procurement Operations Division, 26 W MLK Dr MS W136A, Cincinnati, Ohio 45268 lower.angela@epa.gov

Contracts Specialist

Lisa Mitchell-Flinn, US EPA. Cincinnati Procurement Operations Division, 26 W MLK Dr MS W136A, Cincinnati, Ohio 45268 lower.angela@epa.gov

TASK ORDER SOLICITATION PR-OW-18-00424
TECHNICAL EVALUATION CRITERIA

CLEAN WATER ACT SECTION 303(D) PROGRAM SUPPORT

Contractors shall limit their responses to ten (10) single-sided pages or less (not including attachments, such as resumes, commitment letters, page dividers and cover letter), using their discretion on which criteria to place emphasis. Any information on pages beyond the page number limitation will not be considered or evaluated. The technical proposal shall be submitted using no less than ten (10) point font size and no less than a 3/4" margin on all sides of the page. The term "Offeror" as used in this document shall mean the prime contractor and any proposed subcontractors or consultants.

Proposals will be evaluated on the criteria listed below by the project Technical Evaluation Team and will be assigned a score from 0-3 using the scale listed below. Award will be based on Best Value Analysis where Technical Quality is equally important as Cost.

RATING SCALE

The following rating scale will be used in scoring proposals:

Unacceptable = 0. Criteria is not addressed.

Poor = 1. The proposal fails to adequately address critical requirements of the PWS and technical evaluation criteria; may satisfy some requirements, but not others; reflects major weaknesses or deficiencies. Could not meet requirements without fundamental changes involving a total re-write or redirection of the offer.

Satisfactory = 2. Proposal addresses and meets most requirements of the PWS and technical evaluation criteria, with some correctable and minor weaknesses and/or deficiencies noted. Is generally considered to demonstrate at least minimum requisite experience, qualifications and performance capabilities. Some discussions may be required to address and correct weaknesses or deficiencies.

Superior = 3. The proposal clearly addresses and exceeds requirements of the PWS and technical evaluation criteria with no weaknesses or deficiencies, or very minor, correctable weaknesses or deficiencies noted.

Each point is worth 1/3 of the weight assigned to an individual criterion.

The following criteria and weights will be used in the technical evaluation of Task Order proposals:

CRITERIA

Technical Approach to Developing Products (40 points)

The contractor's proposal should explain their proposed technical approach for compiling and organizing documentation, creating technically sound and user-friendly summaries (e.g., use of

graphics to explain a topic), developing training, and development of other research products as requested in the PWS. The contractor shall demonstrate an understanding of the work to be performed, and demonstrate the appropriate knowledge, capability (availability of appropriate staff, equipment, and resources), and ability to complete the PWS tasks on time. Demonstrated understanding of the typical problems encountered in performing services required by the PWS and the ability to present practical, efficient solutions for those problems. The Contractor's proposal shall include a clear, concise narrative that addresses each of the areas/tasks identified under this task order.

Corporate Technical Experience (30 points)

This criterion evaluates demonstrated corporate experience in fulfilling the technical requirements of contracts/subcontractors/projects similar in technical scope to this solicitation. Of particular interest is the offeror's technical experience conducting thorough research (e.g., literature reviews) and their ability to concisely summarize findings and reach reasonable conclusions supported by their research. The contractor must specifically have and demonstrate in its proposal experience compiling large volumes of documents in an easily accessible and searchable format and experience in developing training materials. In describing corporate experience, include (a) a description of the contract/task order/project, (b) the sponsor, (c) the dates of performance, (d) the specific role the offeror assumed in the overall performance (e.g., prime, subcontractor, or consultant), (e) relevance of the experience to the requirements in the Performance Work Statement of this Task Order, and any other information that would serve to establish the offerors' demonstrated corporate technical experience in fulfilling the technical requirements of contracts similar in technical scope to this task order. Report only those projects completed within the past five (5) years, and projects that are ongoing.

Staff Assignments (30 points)

This criterion evaluates the technical qualifications (experience, expertise, and education) and availability of the proposed staff. The Contractor's proposal should describe the technical qualifications (experience, expertise, and education) and availability of the proposed staff as related to the tasks set forth in the PWS. The proposed staff shall demonstrate professional expertise with the following:

1. Strong research skills, particularly as it relates to the water quality assessment, listing and Total Maximum Daily Load process.
2. Excellent written and verbal communication skills, including experience editing technical documents, summarizing technical and policy issues, and developing training materials.

The information provided by the contractor should clearly establish for each individual or group of staff the educational achievements, specific past experience in performing similar projects to those anticipated under the solicitation, including relevant publications, specific role held in projects cited, length of time in that role, goals met and achievements in the role, and availability for effort on work anticipated herein. Provide resume (limited to two pages) including the following items in a simple, systematic table format or listing:

- a. Name, Professional Level, Job Title, and Proposed Role under the contract.
- b. Percent of time available for the contract and commitment letter if not already an employee of the prime or subcontractor.
- c. Degree(s) held and corresponding field of study.
- d. *Specific project experience related to the PWS area of responsibility.
- e. Job responsibility and goals met for project experience described in item d.

- f. Time dedicated to each project in item d.
- g. Beginning and ending dates of each project in item d.
- h. Current project commitments, including percent of time for each project, and duration of each project.

* It is not sufficient to merely state that an individual or group of individuals worked on a project. EXPLAIN RELEVANCE OF PREVIOUS WORK TO THE REQUIREMENTS OUTLINED IN THE PWS.

COST PROPOSAL INSTRUCTIONS
TASK ORDER SOLICITATION PR-OW-18-00424

The following paragraphs supplement the instructions set forth in the contract clause B-1 "Ordering Procedures". These instructions apply to the prime contractor as well as subcontractors and consultants. It is the prime contractor's responsibility to ensure that all instructions are disseminated to subcontractors and consultants.

Contractors shall submit a summary page for the base and any optional periods. The summary sheet shall be supplemented as necessary to provide thoroughness and clarity in the data presented. Pricing detail shall be included by task for the base and any optional periods. The cost breakdown supporting the above documents shall be breakout the following elements: Direct Labor, including direct labor rate and hours for each proposed individual, Fringe Benefits, Overhead, ODC, Travel, Consultants, Subcontractors, Total Subcontract, Subtotal, G&A, Total Cost, Fee, Total Cost Plus Fee. This cost detail shall be broken out for the base and any optional periods, at the task level. A copy of the cost proposal shall be included in the submission in MS Excel. This copy shall include formulas used to arrive at the CPFF for the base and any optional periods and aggregate totals for the base and optional periods for each element.

When subcontract effort is included in the cost proposal, the prime contractor shall submit charts for each period and for the aggregate (all years, all hours) which clearly indicate the exact allocation of the specified level of effort among the prime contractor and the proposed subcontractors. Specified labor categories as well as job titles within the labor categories should be identified. Subcontractor detail may be provided by the subcontractor directly to the EPA.

If a proposed subcontractor does not have an approved accounting system (one that is considered adequate for use on Government cost-type contracts), the Contracting Officer's consent for a cost type (CPFF, etc.) subcontract will not be granted.

In the cost proposal, the contractor must certify that all proposed personnel (including proposed subcontractor personnel or consultants) for the Professional Level identified by the contractor meet the qualifications specified in the TSAWP IDIQ Contract Attachment 3, "Definition of Labor Classifications."